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Don't Be Too Quick to Give Up on Quicken:[FINAL HOME EDITION]

Sana J. Siwolop. *Tulsa World*. Tulsa, Okla.: Jul 2, 1995. pg. B.8

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Abstract (Article Summary)

You've decided it's time to gain control of a household budget gone berserk. As the first step, you grab the latest version of Quicken, the best-selling personal finance software from Intuit Inc.

Quicken, you've heard, is the most user-friendly product of its kind. Then doubt creeps in as you start to pore over its 300-page user's guide.

Now accounting for almost 80 percent of the market for personal finance software, Quicken long ago outran its competitors, including Microsoft Money, which will soon introduce a new version. A distant third in the market is *Managing Your Money*, recently acquired from H&R Block by Nationsbank and Bank of America.

Full Text (1165 words)

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You've decided it's time to gain control of a household budget gone berserk. As the first step, you grab the latest version of Quicken, the best-selling personal finance software from Intuit Inc.

Quicken, you've heard, is the most user-friendly product of its kind. Then doubt creeps in as you start to pore over its 300-page user's guide.

No need to fear, though. In just an hour or so, you can get the hang of the software and use it to print checks, pay bills and -- starting sometime this fall -- even do your banking from home.

Spend a few more hours tinkering with Quicken, and you'll see its wide range of investment tools, not used to full advantage by nearly 40 percent of buyers.

Now accounting for almost 80 percent of the market for personal finance software, Quicken long ago outran its competitors, including Microsoft Money, which will soon introduce a new version. A distant third in the market is *Managing Your Money*, recently acquired from H&R Block by Nationsbank and Bank of America.

Since last fall, Quicken's market lead has been enhanced by certain budgeting, forecasting and tax planning features added to the program. Intuit's goal is to help users understand not only where they have already spent their money, but also where their money will go down the road.

Users can now create forecasts for specific financial situations -- like the purchase of a new mini-van. Before, Quicken

offered forecasts for only five matters, including saving for college and refinancing a mortgage.

While Quicken has never given technophobes much reason to moan, the latest version is clearly more user-friendly, offering everything from advice on how to use a computer mouse to an icon bar that you can customize to go to a frequent transaction.

A new "snapshot" feature allows users to get an instant picture of their bottom lines with a single keystroke. This eliminates the task of having to run a series of financial reports and charts.

So where do you start with Quicken? Like most products of its kind, Quicken just about installs itself. Users are ready to go in less than five minutes.

After that, it's worth hooking into the 10-minute overview. The best way to get a quick read on Quicken's investment prowess, though, is simply to set up an investment account and start generating financial reports or charts with it.

Try creating a "where am I spending my money?" report, as outlined in the "101 tips and tricks" booklet that comes with the new version, Quicken Deluxe. It will sort your financial transactions from the largest expenditure to the largest source of money.

Quicken still has one serious drawback: There is no very fast way to get an overview of what it can do. Instead, you have to scan the instruction manual, pull down each menu option and explore.

Intuit is trying to address the problem. For now, the best way to learn about Quicken's uses is to go to the "homebase," a feature that was added last fall and that offers information on popular features.

To avoid wasting time, remember that everything put into Quicken needs to go into one of six basic "accounts."

One account is for banking transactions (for checking, savings and money market purposes), and the other accounts are for credit cards, cash, assets, liabilities and investments.

While a single data file in Quicken can hold 255 related accounts, anyone who wants to use the software for both personal and business finances might be better off keeping separate files, each with separate accounts. To save time, assign a "quick key" to zip into an account used often.

Quicken does have a number of relatively underappreciated features. For example, its loan planner can help you compute monthly mortgage payments, compare adjustable-rate loans, figure out the tax advantages of a mortgage, determine when a mortgage will be paid off and even make a mortgage fit a budget by making adjustments in other spending areas.

Quicken still can't compute them for you. But it does contain a tax planner that lets you move tax information from Quicken to an external file that can be read by a tax-specific product like Intuit's TurboTax.

Quicken Deluxe also comes with a guidebook from tax experts, as well as a feature for assigning tax line items to various categories to make tax preparation faster and more accurate.

To make the most out of Quicken's financial help, it's worth plunking down an extra \$20 for Quicken Deluxe. While the standard version of the product is the one that Intuit claims is geared for investors, anyone looking for even simple portfolio management help would be better off sticking with the deluxe version.

In addition to new tax tools, it contains a home inventory feature that tracks household goods and can generate detailed reports for insurance purposes.

If you have a modem, Quicken Deluxe is also handy for retrieving the prices of more than 100,000 stocks, mutual funds and options, by either accessing a special 900 phone number or using the basic services account on Compuserve. A portfolio can be updated daily.

Quicken Deluxe comes in a CD-ROM version as well. Spring for it and you'll get not only multimedia tutorials on Quicken, but also a mutual fund selector that can be tailored to your financial goals.

Or, if you prefer, use the CD-ROM to enter a computer-generated "conference room" and get interactive advice from the tiny, seated images of two personal finance gurus, Jane Bryant Quinn and Marshall Loeb. How's that for hand-holding?

When it comes to more complex investment information, however, Quicken has its limits. It doesn't keep track of every change in tax law, for example, nor does it track aspects of certain sophisticated transactions like commodities trading.

As for the mutual fund selector, while it keeps tabs on the historical performance of a fund, it can't be updated on-line. Instead, users have to buy quarterly updates on floppy disks at \$13.95 each, or \$39.95 for four.

To get the most out of Quicken's investment abilities, keep in mind that the best advice isn't in the hefty user's guide but in the tips booklet that comes with Quicken Deluxe. There, you'll find hints on recording stock buyouts and spinoffs, as well as tracking foreign currencies, employee stock options and family medical expenses.

As you grow ever more confident with Quicken, you may look for new financial territories to conquer. One option might be to wait until this fall, when the next version of Quicken comes out. Or you could spring for Pocket Quicken, the pint-sized version used mostly by traveling business people to track travel expenses and to generate expense reports.

Pocket Quicken is loaded into one of the new devices called personal digital assistants and does not have any investment features. Data can be transferred, however, to a parent Quicken at home. Come fall, Pocket Quicken will be available on its own handheld unit.

Credit: New York Times Service

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